7.16 ACADEMIC RECALL

Overview

The procedures described in this section are for processing a recall appointment for an Academic Senate member who retired from the University of California, Santa Cruz.

Policy Summary

Academic Senate members who have retired from the University of California may be recalled to active service on a year-to-year basis, or for periods less than one year.

Any recall appointment for an academic Senate member whose record is still in the EDB is considered "additional employment."

Any recall appointment for academic employees who are *not* members of the Academic Senate, should be processed using the appropriate Rehire (AREH) or New Hire (AHIR) bundle.

Refer to *Campus Academic Personnel Policies and Procedures (CAPPM) Section 500.200*, for general policy and procedure information or to the appropriate VERIP I/II/III reappointment guidelines for VERIP retirees.

Before You Start

1. Obtain required approval to perform the payroll/personnel action -- a letter from the dean, Executive Vice Chancellor, or Chancellor approving the appointment.
2. Have the employee complete the required forms:
   - Federal and State Withholding Allowance (W-4)
   - Benefits Eligibility Level Indicator (BELI) form (UPAY 726).
   - Opt Out or Loss of Other Group coverage form (UPAY 727), if applicable.
3. Advise the employee to contact the campus Benefits Office within 31 days, to consult regarding the affect of recall on annuitant health benefits.
4. If employee records were still in the EDB, advise them to cancel miscellaneous payroll deductions (Tax-deferred 403(b), California Casualty, Credit Union, etc.)
5. Prepare information for data entry.

Data Entry

Enter data for the recall appointment via the ARCL (Academic Recall) bundle. This bundle contains the following functions:

EAPP (Appointments/Distributions)

EPER (Personnel-Miscellaneous)

XTAX (Tax Information)

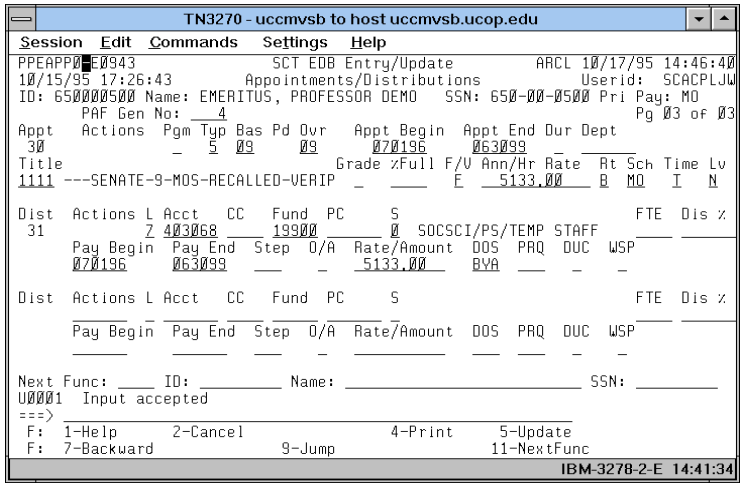
Accessing the ARCL Bundle

1. Log on the Payroll/Personnel System.
2. At the **Next Func** field, type **EEDB** and press **Enter**.
3. Type **ARCL**, the **employee ID**, and press **Enter**.

The EAPP function is displayed for the selected employee.

Completing the EAPP Function

THE EAPP (APPOINTMENTS/DISTRIBUTIONS) FUNCTION


TN3270 - uccmvsb to host uccmvsb.ucop.edu
Session Edit Commands Settings Help
PPEAPP0E0943 SCT EDB Entry/Update ARCL 10/17/95 14:46:40
10/15/95 17:26:43 Appointments/Distributions Userid: SCACPLJW
ID: 650000500 Name: EMERITUS, PROFESSOR DEMO SSN: 650-00-0500 Pri Pay: MO
PAF Gen No: 4 Pg 03 of 03
Appt Actions Pgm Typ Bas Pd Ovr Appt Begin Appt End Dur Dept
30 5 09 09 070196 063099
Title Grade %Full F/U Ann/Hr Rate Rt Sch Time Lv
1111 ---SENATE-9-MOS-RECALLED-VERIP F 5133.00 B MO I N
Dist Actions L Acct CC Fund PC S FTE Dis %
31 7 403068 19900 0 SOCSCI/PS/TEMP STAFF
Pay Begin Pay End Step O/A Rate/Amount DOS PRQ DUC WSP
070196 063099 5133.00 BYA
Dist Actions L Acct CC Fund PC S FTE Dis %
Pay Begin Pay End Step O/A Rate/Amount DOS PRQ DUC WSP
Next Func: ID: Name: SSN:
U0001 Input accepted
===>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 7-Backward 9-Jump 11-NextFunc
IBM-3278-2-E 14:41:34

Notes and Tips

- When processing a recall appointment for an academic employee in addition to the emeritus appointment and distribution, always set up a new appointment and distribution. Refer to *Section 1.11, Appointment and Distribution Procedures*, in this manual.
- If the employee has more than one appointment or more than two distributions, these are stored on additional pages. Use **F8 Forward** or **F7 Backward** to scroll through the pages.
- Refer to *Appendix C, Vacation/Leave Accrual Codes and Rates*, to determine appropriate leave code for this appointment.

Appointment Level Procedure

1. **F9 Jump** to the Next Func field and then press **F15 New Line** to go to the command line.
2. At the command line type **"add a"** to set up the first available appointment.
3. Enter data in the following fields as applicable.

Actions (Action Code)	A code indicating the personnel action which affected the associated appointment.
PGM	System derived code identifying the personnel program under which the appointment is held.
Typ	Enter 5 (academic) The code indicates the appointment type associated with the appointment.
Bas	A code which indicating the service period on which an appointment is based. Press F1 Help for valid codes.
Pd Ovr	A code indicating the number of months in the year over which the salary for the appointment will be paid. Press F1 to see valid codes.
Appt Begin	Enter the date on which the recall appointment is effective in the format: MMDDYY.
Appt End	Date on which the appointment is expected to end, in format: MMDDYY.
Dur	Leave blank.

Dept	A system derived code indicating the department or other administrative unit associated with the appointment.
Title	A code indicating the position or classification title for the appointment. Press F1 to see valid codes.
Grade	Leave blank for academics.
%FULL	Enter the percentage of time that the employee is expected to work. (100% is entered as 1.00)
F/V	Enter the code representing whether the amount of time worked in the appointment is fixed**(F)** or (**V).**
Annual/Hr	Enter the annual salary, hourly, or by agreement amount associated with the appointment.
Rt	Enter the code that indicates whether the rate of pay is annual **(A)** hourly **(H),** or by-agreement **(B).**
Sch	Enter the code that indicates which pay schedule the appointment will be paid, either Monthly Current (**MO**) or Monthly Arrears (**MA).**
Time	Enter the code that represents the method or reporting time for the appointment. Enter T for Exception Time Reporting or enter A for Positive Time Reporting, W if without salary.
Lv	Enter the leave accrual code that indicates the rate at which vacation and sick leave will be accrued. Refer to *Appendix C, Vacation/Leave Accrual Codes and Rates*, to determine appropriate leave code.

EAPP Distribution Level Procedure

1. **F9 Jump** down to the command line
2. On the command line type **"add d"** to add a distribution to your new appointment.
3. Enter data in the following fields, as applicable:

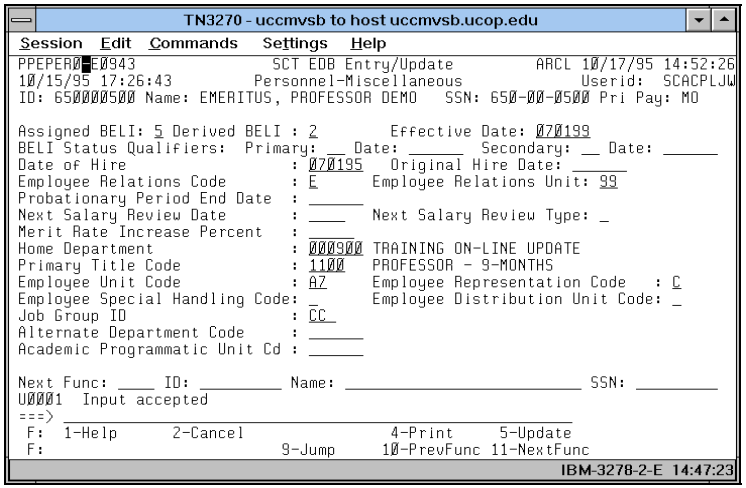
Actions (Action Code)	Code indicating the personnel action which affected the associated distribution. No entry is required.
L	Enter 7 for UCSC location number.
Acct	Enter 'organization' FOAPAL number.
CC	Enter cost center.
Fund	Enter fund number.
PC	Enter activity code (optional, not required).
Sub	Enter 0 or 2 as applicable.
FTE	Leave blank for recalls. The percentage of the budgeted position which the distribution represents, if applicable.
Dist %	The anticipated percentage of time which is chargeable to the account/fund.
Pay Beg	Date on which the pay should be charged to the account/fund, in the format: MMDDYY.

Pay End	Date on which pay is expected to end for the account/fund, in the format: MMDDYY.
Step	The step within the salary range associated with the title code.
O/A	Code indicating that the employee's pay rate is off-scale or above scale in relation to the step and/or salary range for the title code of the appointment, if applicable. Press F1 Help to see valid codes.
Rate/Amount	The monthly, hourly, or by agreement amount associated with the distribution.
DOS	Code indicating the type of compensation associated with the distribution. Press F1 Help to see valid codes.
PRQ	Code indicating the type of perquisite provided.
DUC	Code indicating a group within a bargaining unit to which a distribution for an appointment is assigned for collective bargaining purposes excluding range adjustments.
WSP	Not used for academics.

4. Press **Enter** to invoke range value edits.
5. Press **F11 Next Func** to continue to the next function.

Completing the EPER Function

THE EPER (PERSONNEL-MISCELLANEOUS) FUNCTION


TN3270 - uccmvsb to host uccmvsb.ucop.edu
Session Edit Commands Settings Help
PPEPER0-E0943 SCT EDB Entry/Update ARCL 10/17/95 14:52:26
10/15/95 17:26:43 Personnel-Miscellaneous Userid: SCACPLJW
ID: 650000500 Name: EMERITUS, PROFESSOR DEMO SSN: 650-00-0500 Pri Pay: MO
Assigned BELI: 5 Derived BELI : 2 Effective Date: 070199
BELI Status Qualifiers: Primary: __ Date: ______ Secondary: __ Date: ______
Date of Hire : 070195 Original Hire Date: ______
Employee Relations Code : E Employee Relations Unit: 99
Probationary Period End Date : ______
Next Salary Review Date : ____ Next Salary Review Type: _
Merit Rate Increase Percent : ______
Home Department : 000900 TRAINING ON-LINE UPDATE
Primary Title Code : 1100 PROFESSOR - 9-MONTHS
Employee Unit Code : A7 Employee Representation Code : C
Employee Special Handling Code: _ Employee Distribution Unit Code: _
Job Group ID : CC
Alternate Department Code : ______
Academic Programmatic Unit Cd : ______
Next Func: ____ ID: _____ Name: _____ SSN: _____
U0001 Input accepted
===>
F: 1-Help 2-Cancel 4-Print 5-Update
F: 9-Jump 10-PrevFunc 11-NextFunc
IBM-3278-2-E 14:47:23

EPER Procedure

Enter data in the following fields, as applicable:

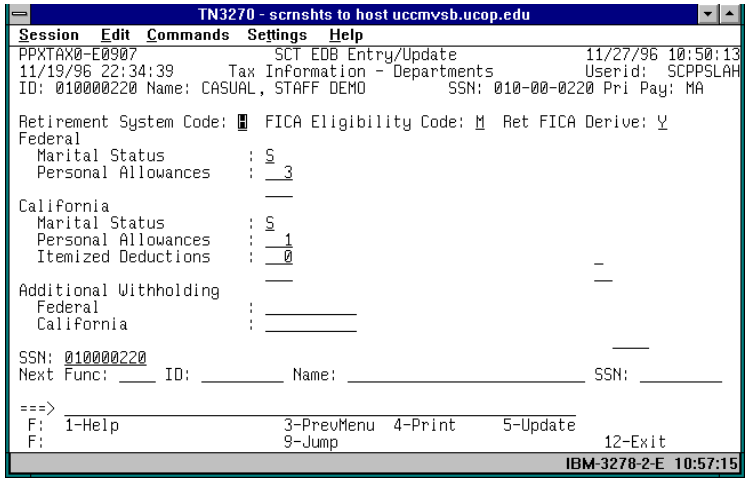
Assigned BELI	Benefits Eligibility Level Indicator (BELI) code indicating the employee's eligibility for health benefits. Press F1 Help to see valid codes.
Derived BELI	System-derived BELI code based on data entered previously. Normally the same as the assigned BELI code.
Effective Date	Date the assigned BELI takes effect.
BELI Status Qualifiers	Primary: Code indicating the primary condition that qualifies the employee for health benefits when the assigned BELI and the derived BELI do not match. Press Fl Help to see valid codes. Date: Date on which the qualifying condition began, in the format: MMDDYY. Secondary: If applicable. Code indicating an additional condition that qualifies the employee for health benefits when the assigned BELI and the derived BELI do not match. Press Fl Help to see valid codes. Date: Date on which the additional qualifying condition began, in the format: MMDDYY.
Date of Hire	Date on which the *most recent* Recall appointment takes effect.
Original Hire Date	Leave blank
Employee Relations Code	Code indicating the employee designation/status for the purpose of collective bargaining. Press F1 Help to see valid codes, or refer to *Appendix E, Employee Relations Codes* for assistance in determining the appropriate code.
Employee Relations Unit	Code indicating collective bargaining unit of an individual. Press F1 Help to see valid codes.

Home Department	Six-digit home department Code. Press F1 Help to see valid codes.
Primary Title Code	System derived for employees with multiple titles. Code indicating the primary title code that will be used for reporting purposes.
Employee Unit Code	System-derived code indicating the collective bargaining unit associated with the employee's job title.
Employee Special Handling Code	Code indicating the title special handling code of the predominate appointment of an individual for collective bargaining purposes.
Job Group ID	System-derived code used for reporting.
Alternate Dept Code	Code indicating an alternate department code. Press F1 Help to see valid codes.
Acad Prog Unit Code	For future use.

1. Press **Enter** to invoke range/value edits.
2. Press **F11 Next Func** to continue to the next function.

Completing the XTAX Function

THE XTAX (TAX INFORMATION) FUNCTION


TN3270 - scrnshts to host uccmvsb.ucop.edu
Session Edit Commands Settings Help
PPXTAX0-E0907 SCT EDB Entry/Update 11/27/96 10:50:13
11/19/96 22:34:39 Tax Information - Departments Userid: SCPPSLAH
ID: 010000220 Name: CASUAL, STAFF DEMO SSN: 010-00-0220 Pri Pay: MA
Retirement System Code: FICA Eligibility Code: M Ret FICA Derive: Y
Federal
Marital Status : S
Personal Allowances : 3
California
Marital Status : S
Personal Allowances : 1
Itemized Deductions : 0
Additional Withholding
Federal :
California :
SSN: 010000220
Next Func: ID: Name: SSN:
===>
F: 1-Help 3-PrevMenu 4-Print 5-Update
F: 9-Jump 12-Exit
IBM-3278-2-E 10:57:15

Notes and Tips

- IMPORTANT: Service Centers should **not** advise employees on their tax withholding or allowances. Refer employees with tax questions to their tax advisor.
- If the employee is claiming Exempt, they cannot enter allowances on UCW-4/DE 4 form.
- Tax data must be entered directly in the EDB from the UCW-4/DE form completed by the employee.
- If an employee requests Earned Income Credit, please contact the Payroll Office.
- You must send the IRS copies of the UCW-4/DE 4 form received from an employee who 1) claims more than 10 withholding allowances or 2) claims exemption from withholding and his or her wages would normally exceed $200.00 per week.

The XTAX Procedure

See *Section 4.5, W-4 Procedures* for W-4 Procedures

This is the last function in the bundle. Proceed to *Review*.

Review

Use **F10 Prev Func** and **F11 Next Func** to navigate through the Review bundle.

1. Make sure you have completed all the required data elements in the bundle.
2. Review all entered data for accuracy and consistency.

Updating the Employee Database

Press **F5 Update** to invoke consistency edits and to display the PAN Subsystem Notification Preparation screen.

Consistency Edit Errors

If there are consistency edits, the Consistency Edit (ECON) screen is automatically displayed. Review all error messages and make necessary corrections.

How to Correct Consistency Errors

From the ECON screen you may:

- Correct errors directly on the ECON screen.
- **F3 Return** to the bundle, make any corrections, then do one of the following:
    - Press **F5 Update** to invoke PAN.
    - Press **F2 Cancel** twice to cancel the update.

See *Consistency Edit Messages (ECON)* in *Section 1.6, System Messages* in this manual for more information and instructions.

PAN Preparation

After pressing **F5 Update** from a data entry screen (if there are no consistency edits) or an ECON screen, you are automatically positioned at the PAN **Comments Entry** screen. From here you can add comments and additional reviewers to the PAN.

1. Add a description of the action and any significant details in the **Comments Entry** screen.
2. Press **F10 NotfPrep** to display the **Notification Preparation** screen, where you can add reviewers as desired.
3. Press **F11 Detail** to display the **Activity Review** screen, where you can review the notification before sending it.
4. Press **F5 Update** to complete the update and send the notification.

If the update is successful, the first function in the bundle appears and displays:

U0007 UPDATE PROCESS COMPLETE

For more information about PANs and additional PAN features, please refer to *Section 1.8, Post Authorization Notification (PAN)*.

Accessing IMSG

1. To access the Message Report Screen go to the **Next Function** field, type **IMSG** and press **Enter**.
2. When the IMSG screen is displayed, review any remaining messages and take the appropriate action.

Disposition of Forms

- Forward the appropriate approval document to the mandatory reviewer.
- Retain the data collection document in the Service Center employee file.
- Forward the completed BELI form to Payroll.